

# Add Contract SCPRS

Procurement Division, DGS  
February 18, 2003

The following screen is used to add a contract. This is the first screen the user sees to enter a new contract into SCPRS. Remember, amendments **cannot** be added to the SCPRS until a contract has first been added to the system.

**Add Contract**

Dept/Agency Name: Department of General Services

Sub-Unit Name:

Original Entry Date: 2/7/2003

Contract Type: 1 - IT Goods \*

Description of Goods/Services:

Contractor Name: \*

Vendor FEIN:

Small Business: ☐ No ☐ Yes

Original Beginning Term: \*

Dept. Contract No./P.O. No.: \*

Contracting Method: 1 - Competitive Bid (CB) \*

Disabled Veteran: ☐ No ☐ Yes

Original Ending Term: \*

PIN No.:

Micro Business: ☐ No ☐ Yes

Original Contract Amount: \*

Financed or Leased: ☐ No ☐ Yes

Leveraged Contract No.:

\* = Required Field Submit

The following pages in the User's Guide address each of the boxes on this first **Add Contract** page. The boxes are listed as they appear on the screen, starting at the top of the screen and going from left to right.

Boxes that have a red asterisk to their right are required and must contain data. If a required field is empty, a message box appears and the system does not allow you to continue when you click on the gray **Submit** button on the bottom of the screen.

## **Dept/Agency Name** - Defaults

The name of the user's department/agency is defaulted to the Department/Agency associated with the user's email address. The user does not have to do anything for this information to be added to the new contract.

## **Sub-Unit Name**

Enter the full name of the Department/Agency sub-unit. This box allows a large amount of text to be added. **Do Not Abbreviate.** For example: Procurement Division is a sub-unit of the Department of General Services.

### Original Entry Date - Defaults

Today's date is automatically entered for a new contract based on the SCPRS computer's system date. The data format is month, day, year order (MM/DD/YYYY). For example: 03/22/2003 is March 22, 2003.

### Contract Type\* - Required Field; pull-down box

This box permits the user to select from a list of choices for contract type. One of the choices **must** be selected. Unless a different type is selected from the drop down box, the default value of 1-IT Goods is automatically used for the Contract Type.

To select a different contract type than 1-IT Goods click on the small arrow in the gray box at the far right inside of the box to view a pull-down listing. The screen looks like that below. Move the mouse to the item to be selected and click on that item. The item should now appear in the Contract Type box.

The screenshot shows the 'Add Contract' form in the Procurement DGS system. The 'Contract Type' dropdown menu is open, displaying a list of 11 options. The form includes various input fields for contract details, with asterisks indicating required fields. A legend at the bottom right states '\* = Required Field'.

A table of required fields for each Contract Type is included here and appears in description window when the blue text [Contract Type](#) above the box is clicked.

	Contract Types	Beginning Term	Ending Term	Delegation*
1	IT Goods	Required		Required*
2	IT Services	Required	Required	Required*
3	IT Consulting Services	Required	Required	Required*
4	Non-IT Goods (Commodities)	Required		Required*
5	Non-IT Consulting Services	Required	Required	
6	Non-IT Services	Required	Required	
7	Public Works	Required		
8	A & E (Architecture & Engineering)	Required**		
9	Interagency Agreement	Required	Required	
10	Grants/Subvention Contract	Required	Required	
11	Memberships/Sponsorships/Subscriptions	Required	Required	

\*Contract Types that require a Department Delegation Number include IT Goods, IT Services, IT Consulting Services, Non-IT-Goods (Commodities) and Interagency Agreements for select data centers. If you do not currently have a delegation number for these contract types, enter the word **Pilot** into the **Dept. Delegation No.** field as a placeholder.

\*\*Refer to the A&E definition below for information on **Required Beginning Term**.

Below is a detailed description of each item that is available for **Contract Type**. If further assistance is needed, please send a message to the SCPRS staff through the **Contact Us** link that is located in the gray area on the left of the screen.

### **Contract Type\***

#### **1 - IT Goods**

Additional Required Fields: **Beginning Term; Delegation No.**

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise? If so, further consideration must be made to determine whether any services are being provided as well, and which has the predominant value to the contract; the items being purchased, or the services being rendered? The dollar value associated with the services provided, or the value of the goods being supplied, are factors that should be considered.

Example: A laptop computer would be considered an IT Goods whereas a copier would be considered a non-IT Good.

#### **2 - IT Services**

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

As defined in GC 11702(e) "Information Technology" includes, but is not limited to, all electronic technology systems and services, automated information handling, system design and analysis, conversion of data, computer programming, information storage and retrieval, telecommunications which include voice, video, and data communications, requisite system controls, simulation, electronic commerce, and all related interactions between people and machines.

#### **3 - IT Consulting**

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

With respect to Information Technology as described in the State Contracting Manual § 1.05:

Is it a Consulting Services Contract? Does the contract have as its sole or primary purpose some type of recommendation, or product of the mind? Are the unique knowledge of the individual and intellectual abilities of critical importance to the success of the contract?

#### 4 - Non-IT Goods (commodities)

Additional Required Fields: **Beginning Term; Delegation No.**

As described in PCC § 10290 "Goods" means all types of tangible personal property, including material, supplies, and equipment.

As Described in the State Contracting Manual § 1.05:

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise? If so, further consideration must be made to determine whether any services are being provided as well, and which has the predominant value to the contract; the items being purchased, or the services being rendered? The dollar value associated with the services provided, or the value of the goods being supplied are factors that should be considered. Example: A contract for painting can include purchase of the paint, but the main value of the contract is for the application of the paint. This would be a services contract.

#### 5 - Non-IT Services

Additional Required Fields: **Beginning Term; Ending Term**

As defined in the State Contracting Manual § 1.05:

Is it a Contract for non-I/T services? Does the contract have as its sole or primary purpose providing non-I/T services? Services contracts are those that have someone doing something. Many Service Contracts are easily identified, e.g. waste removal services, cleaning services, etc. However, some Services contracts are more difficult to determine, especially when they involve other disciplines as well. Example: A contract for carpeting may involve purchase of carpet (commodity) as well as removal of old carpet and pad (Service), and installation of new carpet and pad (Service). The determining factor should be what is the primary focus of the contract and expertise of the contractor.

Purchase of the item, or proper installation?

#### 6 - Non-IT Consulting

Additional Required Fields: **Beginning Term; Ending Term**

As defined in Public Contracting Code: PCCs 10335.5. (a) "Consulting services contract," as used in this article, means services that do all of the following:

- (1) Are of an advisory nature.
- (2) Provide a recommended course of action or personal expertise.
- (3) Have an end product that is basically a transmittal of information either written or verbal and that is related to the governmental functions of state agency administration and management and program management or innovation.
- (4) Are obtained by awarding a contract, a grant, or any other payment of funds for services of the above type.

The product may include anything from answers to specific questions to design of a system or plan, and includes workshops, seminars, retreats, and conferences for which paid expertise is retained by contract.

## 7 - Public Works

Additional Required Field: ***Beginning Term***

An Agreement for the erection, construction, alteration, repair, or improvement of any public structure, building, road, or other public improvement of any kind in accordance with PCC 1101 and SCM, Chapter 10, et al. Public Works contracts may have both amendments for administrative changes to the contract and change orders for work and product specification changes. Both amendments and change orders should be entered into the system as an Amendment.

**Note:** Please refer to **Add Amendment** in Section 4 of the User Guide for instructions to enter Public Works Contracts Change Order information into the SCPRS system and *important information* on the numbering of amendments in the SCPRS for Public Work contracts.

## 8 - A & E (Architectural & Engineering)

Additional Required Fields: ***Beginning Term***

**Note:** Enter the original beginning term of this contract. For contracts with no beginning date, enter the date of execution. The date of execution is the date of Office of Legal Services approval (if required), or the date of signature by the authorizing State Agency (if Office of Legal Services approval is not required due to delegation).

A&E (Architect And Engineering) Contracts: Contracts for the professional services of an architectural, landscape architectural, engineering, environmental, or land surveying nature as well as incidental services that members of these professions and those in their employ may logically and justifiably perform. Also includes construction management services provided by a licensed architect, registered engineer or licensed general contractor which meet the requirements of Section 4529.5 for management and supervision of work performed on state construction projects. Section 4529.5 requirements include construction project design review and evaluation, construction mobilization and supervision, bid evaluation, project scheduling, cost-benefit analysis, claims review and negotiation and general management and administration of a construction project.

## 9 - Interagency Agreement

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No. for select data centers***

As described in the State Contracting Manual § 3.03:

- A. An interagency agreement (I/A) is a contract between two or more state agencies. (GC § 11256)
1. A contract with a California State University campus is always an I/A.
  2. A contract with a University of California campus (UC) may be either an I/A or a standard agreement, but the contract must follow the requirements for whichever type of contract is used. For example, if the UC agrees to calculate cost based upon the provisions in SAM §8752, then it is an I/A. Otherwise, it will be considered a standard agreement.
  3. I/As may not be used for contracts with campus foundations, the federal government, local entities, or other states.
- B. Special provisions apply:
1. I/As are exempt from advertising in the CSCR.
  2. I/As are exempt from competitive bidding.

Note: If the entity performing the service is using subcontracts or purchasing goods, those services and goods should be competitively bid. (Depending on the nature of the goods or services, agencies may be required to get a sole source exemption if subcontracts are not bid.)

3. I/As are not required to meet DVBE participation goals if the entity performing the services is using its own personnel.
4. I/As may provide for advancing of funds (GC §§ 11257 through 11263 and SAM §8758.1)
5. I/A's do not require the Child Support Certification.

C. Requirements are as follows:

1. An Interagency Agreement STD 13 or STD 213 must be used.

Note: An interagency agreement with invoice STD 13A is used only for the renting of equipment and supportive services (SAM § 3522.1; GC § 11256).

2. I/As shall include a provision that the charges have been or will be computed in accordance with state requirements as noted in SAM §§ 8752, and 8752.1 unless there is a legal reason for not doing so. Such a reason might be the transfer of federal funds. The reason should be noted.
3. I/As involving the expenditure of public funds in excess of \$10,000 shall contain a provision that the agreement is subject to the examination and audit of the State Auditor for a period of three years after final payment under the agreement (GC §8546.7).
4. DGS approval is required for I/As of \$50,000 and over unless the agency has a higher delegated authority. Once cumulative amendments to the I/A equal or exceed \$50,000 or the agency's delegated authority, the I/A must be submitted to DGS/OLS for approval (GC § 11256).

## 10 - Grants/Subvention

Additional Required Fields: **Beginning Term; Ending Term**

Grant: To bestow or confer a benefit on another, with or without consideration. Grants provided by state agencies must be authorized by the Legislature. [SCM Glossary]

Subvention/local assistance: A contract financed out of the local assistance portion of the budget; includes agreements providing assistance to local governments and aid to the public directly or through an intermediary, such as a nonprofit corporation organized for that purpose. [SCM Glossary]

## 11 - Memberships/Sponsorships/Subscriptions

Additional Required Fields: **Beginning Term; Ending Term**

Membership: Departmental memberships in professional organizations are considered and processed as a services agreement. Memberships in professional organizations for represented employees are governed by bargaining agreements and payment is by way of reimbursement; memberships in professional organizations for non-represented employees are governed by DPA rules and payment is by way of reimbursement.

Subscription agreement: Standard agreement used by state agencies to obtain services from a Master Services Agreement. [SCM Glossary proposed]

### **Dept. Delegation No**

The Delegation Number identifies the specific type of delegated purchasing authority for which the department has been given authorization to acquire goods and/or IT goods and services. This field can hold up to 20 characters. There are no restrictions in this field, therefore dashes, spaces, numbers, letters, etc. are acceptable.

**Note:** Contract Types that require a Department Delegation Number include IT Goods, IT Services IT Consulting Services, Non-IT-Goods (Commodities) and Interagency Agreements for select data centers. If you do not currently have a delegation number for these contract types, enter the word **Pilot** into the Dept. Delegation Number field.

### **Use a Delegation Number:**

- Goods Base Delegation Number - For the acquisition of goods valued at \$100 - \$25,000, and/or for goods valued at \$5,000 - \$99,999.99 when acquired under GC Section 14838.5.
- Information Technology (IT) Base Delegation Number - For the acquisition of IT goods and services valued to \$500,000.
- Expanded, Special, and One-Time Delegation Number - For the acquisition of goods and IT goods or services which exceed the base delegation limits.



**Do Not Use a Delegation Number:** Acquisitions for non-IT services may not be acquired under the department's delegated purchasing authority; therefore if entering into a non-IT "service" contract, leave this field blank.

The delegation number signifies that the department has been granted delegated purchasing authority by DGS-PD to make purchases as applicable to the specific type of delegated authority granted.

All purchase orders prepared using delegated purchasing authority **must** be prepared using the Contract/Delegation Purchase Order (CDPO) (Std. 65). The delegation number is entered in the "Contract/Delegation Number" box on the Std. 65.

- **Goods Base Delegation Number** - (example: 9-02-1234) Issued for the acquisition of materials, supplies, and equipment up to \$25,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. If acquiring a purchase under GC 14838.5, departments may make purchases up to \$99,999.99 under their Goods Base Delegated Purchasing Authority. See Delegation Guidelines for Goods.
- **Information Technology (IT) Base Delegation Number** - (example: IT-123) Issued for the acquisition of information technology and telecommunications goods and services up to \$500,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. See Delegation Guidelines for Information Technology.
- **Expanded Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. An expanded delegation is a general expansion of authority with no restrictions on the type of goods a department can acquire. See Delegation Guidelines for Expanded Delegations.
- **Special Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. A special delegation is generally for a specific type of goods or group of identified goods. See Delegation Guidelines for Special Delegations.
- **One-Time Delegation Number** - (example: DO-123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limit, but the department is not seeking a special or expanded delegation. Generally, a procurement conducted under this type of delegation is reviewed and approved by PD before the contract is issued.

**Description of Goods/Services\*** - Required Field

Describe the goods and or services related to this contract/procurement, i.e., if the contract is for services, describe briefly the contractor deliverables. Be as concise as possible and include key words that might be used later to search by.



**Contractor Name\*** - Required Field

Enter the complete name of the contractor. **Do not abbreviate or use acronyms. Do not enter the Contractor's address or telephone number.**

**Dept. Contract No./P.O. No. \*** - Required Field

The Contract or Purchase Order number is a unique identifier based on the awarding authority's numbering scheme. This number is assigned to the transaction by the user's department/agency.

**PIN No.**

The PIN Number is the Department of General Services Procurement Information Network (PIN) number assigned by the Procurement Division for a specific contract.

**Note:** If the contract does not have a PIN number leave this field blank.

**Financed or Leased**

Yes or No buttons. Click on the **Yes** or **No** button to indicate if this contract/procurement is financed or leased.

If the user selects "**Yes**", that means that the contract requires Financing **or** Leasing.

If the user selects "**No**", that means the contract is **neither** Financed **nor** Leased.

**Vendor FEIN**

Enter the entire Federal Employer Identification Number (FEIN) or the entire Tax Identification or Social Security Number. This number **must** be a 9 digit numeric value with no formatting such as dashes (-) or periods (.) between the numbers. If the number is more or less than 9 digits and contains characters other than numbers, you will see a message stating that it must be 9 numeric digits with no formatting. You will not be able to enter this contract unless data is entered into this FEIN field.

The FEIN number provided to you by the vendor is confidential information. The only time the user will be able to see the entire number on the screen is when they are adding a new contract or a new amendment. All other SCPRS views will contain only the last 4 digits of the FEIN with an 'X' substituted for all other numbers.

[Go to Section 3a to continue the Add Contract part of the User Manual](#)